

Dear Colleagues:

With UGAmart being a primary vehicle for non-personal services spending, we are making two changes to (a) save you time and (b) ensure that purchasers and approvers remain calibrated on spending guidelines. In order to alleviate burden as soon as possible, these changes will be effective September 14.

- **Comments no longer required for purchases under \$25,000.** Comments will no longer be required on every UGAmart requisition above \$2,500. Instead, the threshold for required comments will increase to \$25,000. We hope this change will save you time.
- **Spending guidelines added to existing quarterly pop-up screen.** The below [spending guidelines](#) will be added to the pop-up that purchasers and approvers already certify every three months. No additional documentation is required.

The guidelines are good education oversight practices. Given the current fiscal climate, UGA needs to remain vigilant and intentional in every purchasing and approval decision. We are grateful for your leadership, now more than ever. Please contact Procurement at procure@uga.edu if you need any assistance with purchasing or have any questions.

Regards,

Chad & James

Chad Cleveland, Interim AVP, Finance Division

James Shore, Senior AVP for Finance & Administration and Budget Director



Fig 1: Spending Guidelines

Initiators and approvers should consider the following guidelines to ensure judicious spending practices.

- **Reasonable:** Is the purpose/intent reasonable, appropriate, and is it associated with the activity for which it is purchased?
- **Mission-Centric:** Does the information provided adequately document how the purchase benefits or supports UGA’s mission of instruction, research, and public service & outreach?
- **Fund Appropriate:** Is the fund source appropriate for the purchase?
- **Unit Priorities:** Does the purchase align with department/unit budget priorities and realities?
- **Compliant:** Does the purchase comply with policy and procedure?
- **Red Flags:** Is there anything about the purchase that is questionable or requires additional documentation?
- **Prudent Person Rule:** Apply the “prudent person rule” - prudent-person rule sets a reasonable expectation that the person will make rational, wise decisions when making financial choices on behalf of the owner of the funds.

Fig 2: Sample UGAmart Popup for periodic validation at login

